

Customer Templates User Guide

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Customer Templates

A customer order template is a list of products that a customer orders regularly, such as wine lists for restaurants, or spare-parts lists for customer machinery. Each template is created for a selected ship-to address, and an unlimited number of templates can be created for each address.

Once created, order templates can be used as lookups during sales transaction entry by accessing the Template Select window. The Template Select window also displays the history of orders placed for a selected item - *i.e.*, quantities, price, order numbers, and dates.

The main features of the Trinity Customer Templates module are:

- The facility to set up customer order lists, based on historical data if required
- The facility to update order templates automatically
- Template lookup in sales order entry enables rapid selection of items
- The facility to restrict customers to purchase items from a specified template
- The facility to purge templates of unrequired items
- The facility to copy template details
- The option to base template history on sales orders or invoices
- Generate a template history option to generate templates from customers' historical data
- The facility to create templates from Extended Pricing price sheets

A default template can be selected for individual customer ship-to addresses if required in the Default Template Extras window. One template per customer ship-to address can also be selected as the historical template in the Template Maintenance window. This template is automatically updated with any new items ordered by a customer during order entry. All other templates are fixed templates and can only have items added or removed in the Template Maintenance window.

Templates can be copied using the Template Copy window. Alternatively, they can be generated from historical data using the Generate Template History window or from Microsoft Dynamics™ GP Extended Pricing price sheets using the Price Sheet Template Creation window. Historical information is updated for each customer regardless of whether order templates have been created, and can be displayed directly in the Order History window. Template details for a selected customer range can be printed from the Template Report window.

Purge facilities allow the removal of historical records. Use the Template Purges window to delete template items from a historical template that have not been ordered since a specified date, and to delete order history that is older than a specified date.

Sales Information window

The Sales Information window provides item search facilities when using Sales Transaction entry.

A search string can be entered in the Sales Transaction Entry item number field; matching items are then displayed in the Sales Information window.

Fields that can be searched include Item Number, Item Description, Generic Description, and Class ID.

The Sales Information window can also be used to display customer templates.

An item can be selected from the list displayed in the Sales Information window and added to the current sales document.

After a sales document line has been entered, there is an option for the user to return automatically to the item list on the Sales Information window, allowing rapid entry of a list of items into a sales document.

More information about an item is displayed in the detail section of the Sales Information window. This data includes available inventory, selling price, margin, and sales pattern.

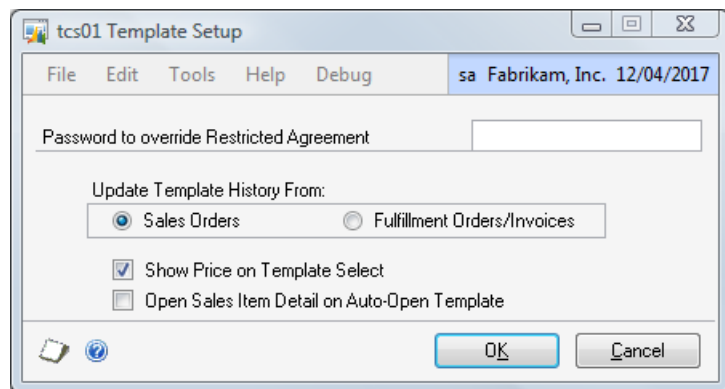
Setup

1. Template Setup Window

Tools >> Setup >> Trinity >> Templates/TurboSOP >> Template Setup

Use the Template Setup window to:

- Set up template parameters



The update template history settings on this window are especially useful if you enter sales documents directly as fulfillment orders/invoices rather than as orders.

Note that sales orders are the default parameter for the Customer Templates module. If you want historical templates to be based on sales orders, and have not already set the parameter to base them on fulfillment orders/invoices, then you do not need to adjust the setting in this window.

1.1 Setting up Template Parameters

To set up Template parameters:

1. If you require the facility to override restricted agreement templates (see Setting Template Defaults for Customers), then enter a password.

If a customer is on a restricted agreement template, items not on the template cannot be entered into sales transactions for the customer. You can set up a password here so that if a non-template item is entered into a sales transaction for a customer on a restricted agreement template, then you are given the option to enter the password. If the correct password is entered, the item is accepted into the transaction.

If no password is entered, then restricted agreement templates cannot be overridden.

2. Under Update Template History From, click to select either Sales Orders or Fulfillment Orders/Invoices.

Your selection sets the parameters upon which historical templates are based. For example, if you select Fulfillment Orders/Invoices, then historical templates are based on Sales Fulfillment Orders/Invoices rather than Sales Orders.

3. Click the Show Price in Template Select option to display the most recent price an item has been sold to the customer at on the Template Select window.
4. Select the Open Sales Item Detail on Auto-Open Template option if you would like the Sales Item Detail Entry window to open automatically when the Template Select window is auto-opened (see Setting Template Defaults for Customers).
5. Click OK.

Note that you can click Cancel at any point before clicking the OK button to close the Template Setup window.

2. Sales Information Defaults window

Tools >> Setup >> Trinity>> Templates/TurboSOP >> Sales Information Defaults

Use the Sales Information Defaults window to:

- Specify options for using the Sales Information window

2.1 Setting up Sales Information defaults

To setup Sales Information defaults:

1. Choose to set up General defaults for all users or to set up values for a specific user. The General options are used for any user who does not have their settings.
2. Click Maintain Defaults. Any existing values are displayed.
3. Select the option Activate Sales Information window to use the Sales Information window from within Sales Transaction Entry. If this option is selected, when CTRL-L is used in the item number field in Sales Transaction Entry, the Sales Information window is used to search for items instead of the Item lookup window.

Note that the remaining options may be set up without marking the option Activate the Sales Information window, but only apply when the window is active.

4. Select the option Automatically Return to Sales Information Window on Entry of a Line if you would like to return to the Sales Information window after each line is completed when entering document lines in Sales Transaction Entry.
5. The option Use Sales Information Window as Template Selection Window works in conjunction with Default Template functionality. If a customer has a default template ID selected in the Default Template Extras window, and the Auto-Open Default Template option has been chosen, the Default Template is displayed in the Sales Information window instead of in the Template Select window.
6. Select the option Show Promotional Price Flag in the Scrolling Window if you would like items on promotion to be indicated with an icon on the Sales Information window. Note that your item search runs more slowly if this option is chosen.
7. If you use the Trinity Item Lifecycle module, you can omit any items marked as Do Not Sell by selecting the Exclude if Flagged as Do Not Sell option.
8. Select Include Inactive Items if you would like to include items marked as inactive in the Item Maintenance window in your search.
9. Select one of the following options from the Quantity Filtering dropdown:

| | |
|---|--|
| All | Display all items regardless of stock balance |
| Only if Available Qty > 0 | Only show items which have a quantity available |
| Only if Available + On Order Quantity > 0 | Only show items for which the total of (available quantity + quantity on purchase order) > 0 |

10. Show the default value for the maximum number of items to be selected in the Sales Information window in the Maximum Items field.
11. Under Item Inquiry Options, choose the fields that you would like to see in the detail section of the Sales Information window.

Cards

3. Template Maintenance Window

Cards >> Trinity>> Templates >> Maintenance


Use the Template Maintenance window to:

- Create and edit templates

| Seq. No | Item Number | Description |
|---------|---------------|-------------|
| 20 | 100XLG | |
| 30 | ACCS-HDS-1EAR | |
| 40 | ACCS-HDS-2EAR | |
| 80 | 128 SDRAM | |
| 100 | HD-40 | |
| 120 | HD-60 | |
| 140 | 3-A2998A | |
| 160 | 3-E4471A | |

3.1 Creating and Editing Templates

To create or edit a template in the Template Maintenance window:

1. Enter a Customer ID or click the Customer ID lookup to select one from the Customers and Prospects window.
2. Enter a Ship-to address or click the Ship-to lookup to select one from the Addresses window.
3. Enter a Template ID to identify your template, or click the lookup to select one from the Template Lookup window. If you select an existing template, its details are displayed in the scrolling window.
 -  Click the Show button to display item descriptions.
4. Enter a Template Description to describe your template.
5. Select the Update From Sales Transaction Entry checkbox if you want this template to be the historical template.
6. Select the Resequence on Retrieval checkbox if you want sequence numbers to be automatically regenerated each time the template is loaded into Template Maintenance.

Sequence numbers are required for each item on a template and can be entered by the user or automatically generated by the system. They provide an alternative method of sorting the template within order entry, such as sorting wine lists by bin number.

7. Enter an Item Number or click the lookup to select one from the Items window. Repeat for each item to be added to the template.
8. Enter a new Seq. No. for each item on the template or accept the system defaults.
9. Click Save to save your template.

Click the Delete button to remove a template.

4. Default Template Extras Window

Cards >> Trinity>> Templates >> Default Extras

Use the Default Template Extras window to:

- Restrict a customer to purchasing items from a specified template
- Set a default template for a customer/address combination

Note that the Default Template Extras window is also available as an Additional option from the Customer Maintenance window.

| | |
|-------------------------------------|--------------------------------|
| Customer ID | AMERICAN0002 |
| Name | American Electrical Contractor |
| Address ID | PRIMARY |
| | 3456 North Calumet Avenue |
| Template ID | AMTEMPLATE1 |
| <input type="checkbox"/> | Restricted Agreement |
| <input checked="" type="checkbox"/> | Auto-Open Default Template |

4.1 Setting Template Defaults for Customers

To set template defaults for customers in the Default Template Extras window:

1. Enter a customer ID or select one using the lookup.
2. Enter an address ID or select one using the lookup or browse buttons.
3. Enter a template ID or select one using the lookup. The selected template ID is the default template for the displayed customer/address combination.
4. Click the Restricted Agreement option to limit the selected customer/address combination to purchasing items from the selected template only.
5. Click the Auto-Open Default Template option to cause the Template Select window to open automatically displaying the selected template ID when entering items into a sales transaction for the selected customer/address combination.

If the “Open Sales Item Detail on Auto-Open Template” option has been selected in the Template Setup window (see Template Setup), the Sales Item Detail Entry opens at the same time as the Template Select window auto-opens.

6. Click Save to save the settings and close the window.

Click Delete to delete default template settings.

5. Template Copy Window

*Cards >> Trinity>>
Templates >> Copy*

Use the Template Copy window to:

- Copy templates to other addresses or other customers

| Source Template: | | |
|------------------|--------------|--------------------------------|
| Customer ID | AMERICAN0002 | American Electrical Contractor |
| Address ID | PRIMARY | 3456 North Calumet Avenue |
| Template ID | AMTEMPLATE1 | American electrical template |

Historical Template

Copy To:

Other Addresses For Customer
 Other Customers

From Address: WAREHOUSE
To Address: WAREHOUSE

Copy Mode: Add Items To Template Overwrite Existing Template

5.1 Copying Templates

To copy a template report in the Template Copy window:

1. Enter a Customer ID or click the lookup to select a Customer ID from the Customers and Prospects window.
2. Enter an Address ID or click the lookup to select an Address ID from the Addresses Lookup window for the selected Customer.
3. Enter a Template ID or click the lookup to select a Template ID from the Template lookup window. You can also use the browse buttons to move between Template IDs.

Note that if you have set the Template to be a Historical Template, then the Historical Template checkbox is highlighted.

4. Click to select whether you want to copy the selected template to Other Addresses for Customer or Other Customers.
5. If you select Other Addresses for Customer, you should then enter From and To Addresses or click the lookups to select addresses from the Addresses Lookup window.
6. If you selected Other Customers, enter From and To Customers or click the lookups to select Customers from the Customers and Prospects window.

Note that this copies the selected template to all addresses held for the selected Customer range. To apply the template copy to the Primary Ship-To Address only, click the Primary Ship-To Address Only checkbox. This field only displays if you selected the Other Customers option.

7. For Copy Mode, click to select Add Items to Template or Overwrite Existing Template. If you select to Add Items to Template, any items new to the address or customer are added to their existing template.

If you select to Overwrite Existing Template, any templates already held for selected Customer/address combinations are overwritten in full, and the Customer/address combination is assigned the full template.

8. Click the Copy button to apply the template copy selections that you have made.

Note that you can click Cancel at any point before clicking the Copy button to close the Template Copy window.

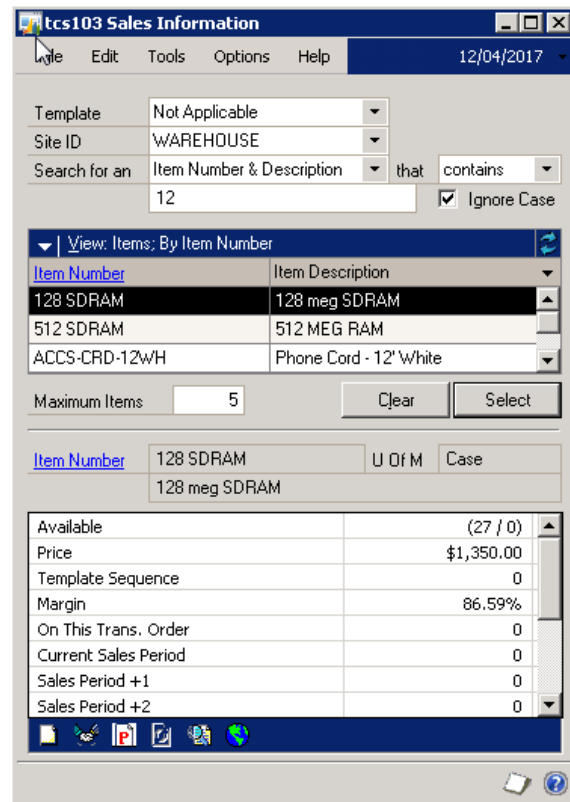
Enquiries and Reports

6. Sales Information Window

Sales Transaction Entry >> Item number field >> CTRL-L

Use the Sales Information window to:

- Search for and select items during sales transaction entry
- View item details such as price, margin and available inventory during sales transaction entry









6.1 Using the Sales Information window

To use the Sales Information window during sales transaction entry:

1. The Activate Sales Information window option must be enabled in the Sales Information Defaults window to use the Sales Information window in Sales Transaction Entry. Once this option has been enabled, using CTRL-L on the Item Number field in Sales Transaction Entry opens the Sales Information window instead of the Item lookup.
2. If you enter CTRL-L on an empty item number field, your cursor moves to the Search field on the Sales Information window, and you can enter search parameters as required.
3. If you enter a search string and press CTRL-L, the system performs an Item Search using your search string in conjunction with the search parameters already selected in the Sales Information window. If the search finds a single item number, this is returned to the Sales Transaction Entry item number field. If multiple item numbers are identified in the search, these are displayed in the Sales Information window, from where you can select the item that you require.
4. To return from the Sales Information window to Sales Transaction Entry, press ESC.
5. To disable the Sales Information window to use the Item lookup, use the Sales Information Window Active setting under the Options menu. If you wish to select items from the Item Catalog (Catalog Based Sales module) or the Template Select window, it is advisable to disable the Sales Information window.
6. The detail section of the Sales Information window shows further information about either the item currently highlighted in the Sales Information scrolling window or the item on the current Sales Transaction line. The fields displayed are those specified in the Sales Information Defaults window.

7. Use the buttons in the detail section to retrieve additional item information. Note that these options are only available if the appropriate software module has been installed.

| | |
|---|---|
|  | Open item notes |
|  | Open Inventory Available to Promise Inquiry |
|  | Open Aggregate Promotion inquiry window |
|  | Open Order History inquiry window |
|  | Open Price Trace window |
|  | Open Quantities by Site window |

8. After entry of each line on the sales document, the user is returned to the Sales Information window to select another item if the Automatically Return to Sales Information Window option is set in the Sales Information Defaults window.

Using the Search parameters in the Sales Information window:

1. From the Search dropdown menu, choose to Search on Item Number, Item Number & Description, Item Description, Generic Description, Short Description, Item Class, or Class Description. Then choose to search whether your selected field contains or begins with your search string.
2. Enter a search string. Note that you can enter multiple strings separated by a “+” sign. For example, searching for “ch+ay” would search for items containing the strings “ch” and “ay.”
3. When you tab off the search string field, the scrolling window is populated with the search results.
4. Highlight an item in the scrolling window to show more information about the item in the detail section of the window. The fields displayed are those specified in the Sales Information Defaults window.
5. Click Select or press enter to choose an item from the scrolling window to be entered into your Sales Transaction.
6. Click Clear to clear your search string.
7. Note that the Site ID takes its value from the Default Site ID on the Sales document. The item search is restricted to items that are linked to the selected site. Change the Site ID to All Sites to show items across all sites.
8. The default value for the maximum number of items to be selected in the search can be specified in the Sales Information Defaults window. This value can be changed at runtime by changing the Maximum Items field.
9. Default values for the Item Quantity filter and the Exclude if Flagged as Do Not Sell option can be specified in the Sales Information Defaults window. These values can be changed at runtime by selecting options in the View dropdown menu of the scrolling window.
10. The Include Inactive Items setting is adjusted using the Options menu.

Using the Sales Information window as the Template Selection window:

1. You can view a customer template in the Sales Information window by selecting a Template ID. If a Template ID is selected, the item search is restricted to items on the selected template.
2. The customer’s default template can be displayed automatically in the Sales Information window. To do this:
 - set the Use Sales Information window as Template Selection window option in the Sales Information Defaults window.
 - set up a default template for the customer and ship-to address in the Default Template Extras window, and mark to Auto-Open Default Template.

When entering a sales document for this customer and ship-to address, the Sales Information window opens automatically with the customer’s default template displayed.

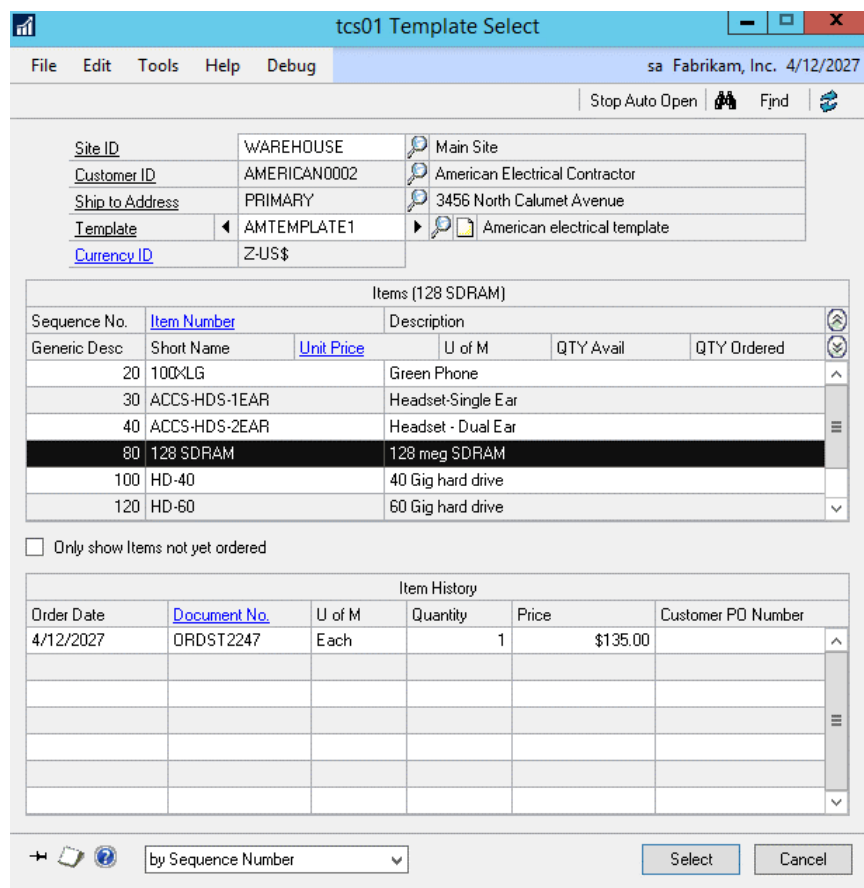
7. Template Select Window

Inquiry >> Trinity>> Templates >> Template Select

Use the Template Select window to:

- Select template items during sales transaction entry
- View order history

Note that the Template Select window can also be opened from the Sales Transaction Entry window – choose Template Select from the Additional menu.



If you selected the Auto-Open Default Template option in the Default Template Extras window, the Template Select window open when entering items into sales transactions. The window displays the selected default template for the customer/address combination unless the Sales Information window is used for this.

7.1 Selecting Template Items During Sales Transaction Entry

An order template can be used as a lookup during sales transaction entry.

Note that you can click the Stop Auto Open button to close the Template Select window for the duration of the current transaction.

To look up a template during sales transaction entry in the Template Select window:

1. Start to enter your sales document details in the Sales Transaction Entry window. Once you have selected a Document No. and a Customer ID, the Template Select window becomes available to use.
2. Select Template Select from the Additional menu.
3. The Template Select window opens, showing the current Customer ID selection and default Ship-To address, Template ID entries, and Currency ID. Accept these settings or make new selections.
4. Each template item is displayed in the Items scrolling window. The Unit Price for each item is the price that is applied to the item in sales transaction entry, whether you are using standard pricing or Extended Pricing. The Quantity Ordered is the quantity on the current sales transaction.

Click the Refresh button to refresh this quantity.

You can also click the Only Show Item Not Yet Ordered option to only display items not yet added to the current sales transaction.

5. If you want to select multiple items from the template, click the Push Pin button to keep the Template Select window open after each selection. For each item to be selected:
 - a. Highlight an item or click Find to locate one in the Find Item window.
 - b. Click the Select button to return the selected item to the sales transaction.
6. Enter the remaining transaction details in the usual way.

If the customer/ship-to address has a historical template, it is updated with any new items when you create and save an order. You are given the option to create a historical template automatically when you first create an order for a new ship-to address.

7.2 Viewing Order history

When selecting template items during sales transaction entry, the lower half of the Template Select window displays the order history for a selected template item.

To view the order history of an item in the Template Select window:

1. Highlight an item in the Items scrolling window.

The Item History scrolling window displays any past orders associated with the selected item. For each order, the order date, order number, unit of measure, quantity, and price are shown. If you are also using the Trinity Catchweights module, the Catchweight Units of Measure and listed quantities are also displayed in the Item History scrolling window.

2. To view an order in more detail:
 - Highlight an order in the Item History scrolling window or click the Find button to locate one in the Find History window.
 - Click the Order Number zoom. The Order History window opens.

8. Order History Window

*Inquiry >> Trinity>>
Templates >>Order
History*

Use the Order History window to:

- View historical orders


Note that the Order History window can also be opened by clicking the Order Number zoom in the Template Select window.


| Item Number | U of M | Qty | Price | Extended Price |
|---------------|--------|-----|----------|----------------|
| 128 SDRAM | Each | 1 | \$135.00 | |
| ACCS-HDS-1EAR | Each | 1 | \$0.95 | |

8.1 Viewing Historical Orders

To view historical orders in the Order History window:

1. When called from the Template Select window, the Order History window opens, showing the current Customer ID, Ship-to address, and Document No. selection. Accept these settings or make a new selection.
2. Each item in the order is displayed in the scrolling window. The item number, unit of measure, quantity, and price is listed for each item.

 Click the Show button to display the item description and extended price.

 Note that if you are using the Trinity Catchweights module, clicking the Show button displays Catchweight Units of Measure and quantities for the listed orders.

9. Template Report Window

*Reports >> Trinity>>
Templates >> Report*

Use the Template Report window to:

- Print template details for a range of customers

9.1 Printing Template Details

To print a template report in the Template Report window:

1. Enter a From Customer ID or click the lookup to select one from the Customers and Prospects window.
2. Enter a To Customer ID or click the lookup to select one from the Customers and Prospects window.

To print a single template, select Print from the File menu when the template is displayed in the Template Maintenance window.

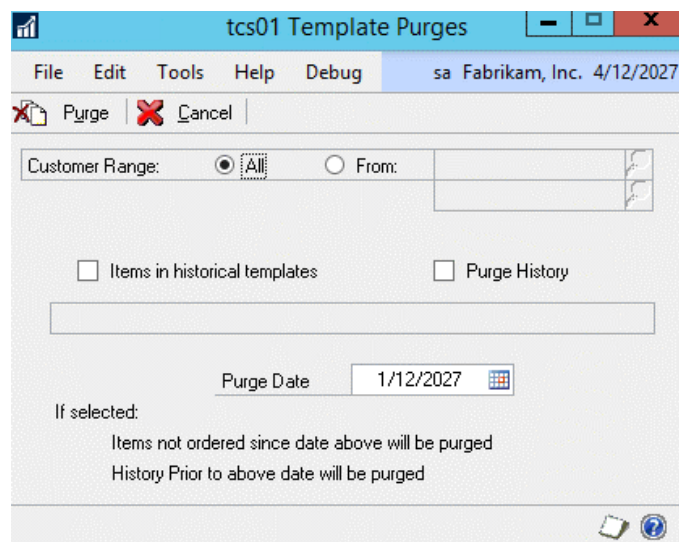
Routines

10. Template Purges Window

Tools >> Routines >> Trinity >> Templates >> Purge

Use the Template Purges window to:

- Remove items that have not been ordered since a specified date from a historical template
- Remove order history older than a specified date



10.1 Removing Historical Information

To remove historical items and order history in the Template Purges window:

1. Select All to purge all customer details, or select From to purge a range of customer details. If you select From, enter to and from Customer IDs to specify a range, or use the lookups.
2. Select the Items in historical templates checkbox or the Purge History checkbox to remove items from historical templates or purge history, or do both.
3. Enter a Purge Date.
4. Click the Purge button.

History older than the entered date is deleted.

11. Generate Template History Window

*Tools >> Routines >>
Trinity>> Templates >>
Import*

Use the Generate Template History window to:

- Generate historical templates for selected orders

This will be particularly useful if you want to create historical templates for customers whose sales orders were created before you set up the Customer Templates module.

11.1 Generating Historical Templates for Selected Orders

To generate historical templates for selected orders in the Generate Template History window:

1. Enter the Start Date from which you want a historical template to be generated. All **orders** (i.e., not quotes, returns, or invoices) placed from that date to present are included on the historical templates for your selected range. These orders must have a Ship-to Address specified, or a template is not created.

Note that the Start Date default initially displayed in the window is three months before the current date.

Any Customer/Address combination for which you have previously specified that a historical template isn't required is omitted from processing. Enter a Customer From and To range or use the lookups to select Customers from the Customers and Prospects window. You can click All to select all Customers.

2. Enter a Class ID From and To range or use the lookups to select Class ID's from the Customer Classes window. You can click All to select all Class IDs.

Note that if you include a Customer in the range that has a Class ID not included in the range (or no Class ID), then this Customer is not included in the processing selection.

3. Click Process to create historical templates for your selection.

Note that you can click Cancel at any point before clicking the process button to close the Generate Template History window.

12. Price Sheet Template Creation Window

*Tools >> Routines >>
Trinity >> Templates >>
Price Sheet Template*

Use the Price Sheet Template Creation window to:

- Create templates from Extended Pricing Price Sheets

Note that this window is only available if you are working with Extended Pricing in Microsoft Dynamics™ GP. See the Microsoft Dynamics™ GP User Manuals for further information on working with Extended Pricing.

12.1 Creating Templates from Extended Pricing Price Sheets

To create templates from Extended Pricing price sheets in the Price Sheet Template Creation window:

1. Enter the Price Sheet ID on which you want to base a template, or select one using the lookup.
2. Enter a Template ID and Template Description for the new template that you want to create.

Note that you can enter a currently existing template - see the Copy Mode options for further details.

3. The Update from Sales Transaction Entry checkbox allows you to set templates created in this window as historical templates for the selected customer range. Select this option to set the template as a historical template.

Note that where any customers in the selected range already have a historical template, the template created here is assigned to them as a standard template. Details are printed in the Template Creation from Price Sheet report that is printed automatically at the end of window processing.

4. Enter the customer range that you want to assign the template to, or select a customer range using the lookups.
5. Alternatively, select a price book ID. The template is then assigned to all customers that have been linked to the selected price book.
6. Click the Primary Ship-to Address Only option to assign the template to the Primary Ship Address only for the selected customer range. Not selecting this option results in the template being assigned to all addresses for the selected customers.

7. You have two options under Copy Mode. These options apply if you have selected an existing template as your Template ID.

| | |
|--------------------------------|--|
| Add Items To Template | Items from the price sheet not currently on the template are added to the template |
| Overwrite If Existing Template | The template is overwritten in its entirety with items on the price sheet |



Click to select the option you require.

8. Click Copy to copy details from the price sheet to the template for selected customers.

Note that you can click Cancel at any point before clicking the Copy button to close the Price Sheet Template Creation window.

Appendix A

Customer Templates – Access to Windows

| Window Name |  Menu Access |  Other Access |
|-------------------------------|---|---|
| Default Template Extras | Cards >> Trinity>> Templates >> Default Extras | Cards >> Sales >> Customers >> Additional >> Default Temp. Extras |
| Generate Template History | Tools >> Routines >> Trinity>> Templates >> Import | |
| Order History | Inquiry >> Trinity>> Templates >> Order History | Sales Transaction Entry window >> Additional >> Order History Lookup |
| Price Sheet Template Creation | Tools >> Routines >> Trinity>> Templates >> Price Sheet Template | |
| Sales Information Defaults | Tools >> Setup >> Trinity >> Templates/TurboSOP >> Sales Information Defaults | |
| Sales Information | | Sales Transaction Entry >> Item number field >> CTRL-L |
| Template Copy | Cards >> Trinity >> Templates >> Copy | |
| Template Setup | Tools >> Setup >> Trinity >> Templates/TurboSOP >> Template Setup | |
| Template Maintenance | Cards >> Trinity >> Templates >> Maintenance | |
| Template Purges | Tools >> Routines >> Trinity >> Templates >> Purge | |
| Template Report | Reports >> Trinity >> Templates >> Report | Template Maintenance window >> File >> Print (once a valid template has been selected) |
| Template Select | Inquiry >> Trinity >> Templates >> Template Select | Sales Transaction Entry or Sales Item Details Entry windows >> Additional >> Template Select |

Appendix B

Customer Templates - Reports

| Report Name | Module | Functionality |
|---|------------------|---|
| Sales Transaction Templates report | Template Selling | Select a range of templates in the Template Report window and print report Individual templates can be reported on through the Template Maintenance window |
| Template Copy Audit report | Template Selling | Prints details of processing performed through the Template Copy window |
| Template Creation from Price Sheet report | Template Selling | Prints details of processing performed through the Price Sheet Template Creation window |

Appendix C

About Trinity

Help >> About Microsoft Dynamics GP >> Additional >> About Trinity Suite

Use the About Trinity Suite window to check your registration information and installation details. The window tells you which Trinity modules you are registered to use and which have been installed on your system.

